SirsiDynix Enterprise Training Guide

End User

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Introduction

Training Overview

Intended Audience

This guide is intended for staff to understand the end user experience within Enterprise. This information will also benefit Enterprise administrators before taking additional training.

Prerequisite

There is no pre-requisite knowledge necessary before using this guide.

Goals

After completing this guide and/or the corresponding course, staff will know how to:

Search the Catalogue

Place holds

Manage "My Account"

Create "My Lists"

Getting Connected

Access information to your particular Enterprise instance will not be provided during training. Your Site Administrator will have this information.

What is Enterprise

Enterprise is a simple-to-use faceted search product that becomes the foundation for a range of "user experience" solutions. Features include fuzzy search technology, highly efficient search index updating, intuitive user interfaces, powerful finding aids, consortia support, and deep integration with SirsiDynix integrated library systems.

All searches are general keyword searches, whose results can be filtered quickly, using pre-defined facets, to find the needed results. It is a powerful web-based front end to your ILS that can be easily added to any webpage.

Enterprise allows users to search the library's catalog as well as other resources. Searches can be entered with or without limits. Additional search options are available with an advanced search and search facets.
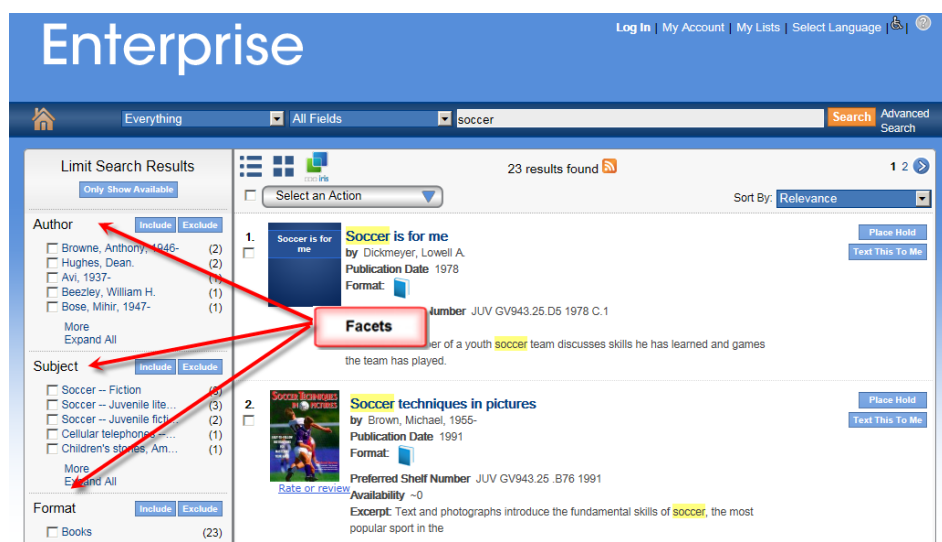
Look and Feel

This guide will demonstrate Enterprise features with images from a generic system. However, the appearance of your Enterprise system will be defined by your Enterprise administrator. Here are a few examples of how Enterprise can look:
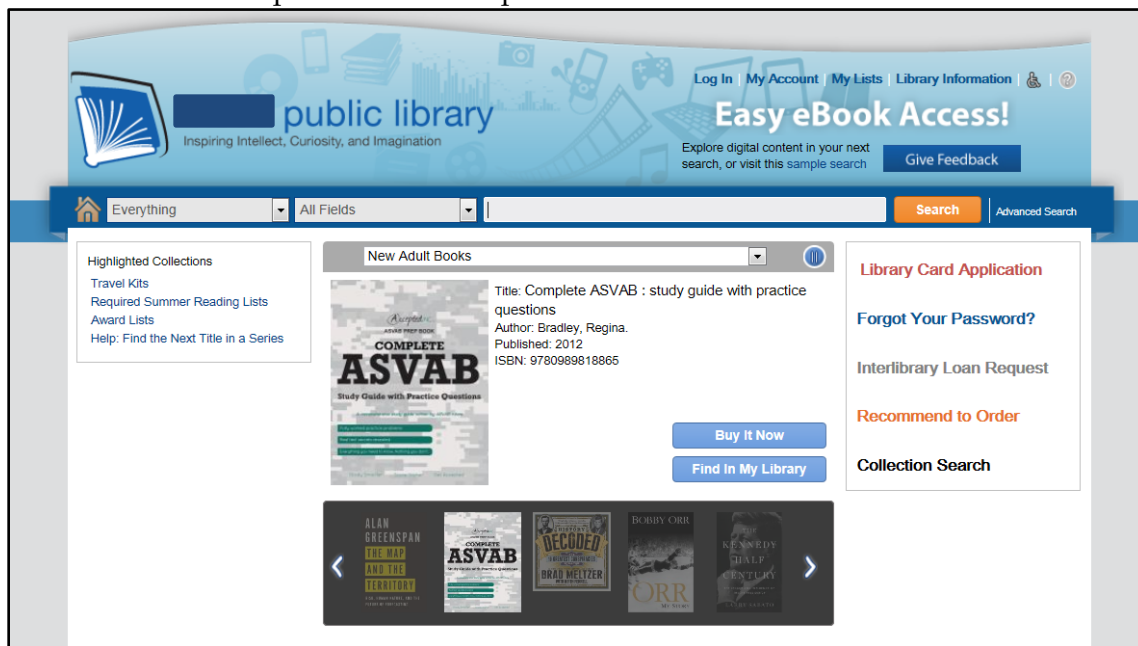
New TRL Discovery Search

Discovery Search is an alternative to the primary TRL Library Catalog. It has:

• **New** "Log In" so you login just once.
• **New** "My Account" to see checkouts, holds, and fines; renew checkouts and edit/cancel holds.
• **New** "My Lists" with drag-and-drop edits.
• "Did you mean?" catches misspellings.
• A new search engine with improved "relevance" searching.
• Improved search "facets".
• New York Times bestsellers lists.
• New Advanced Search.
• Facebook "Like" button.
• More improvements and new features coming soon.

Questions or comments? Talk to staff in your local library or contact our Ask A Librarian service or send an email to comments@trlib.org.

• Catalog Search
• TRL Home
• Library Locations & Hours
• Ask A Librarian
• Pay Fines & Fees Online

• OverDrive ebook, audiobook, video & music downloads
• Freegal music downloads
• Tumblebooks ebooks for kids

• New Items in the Library
• Booklists for all ages
• Email newsletters

• Library Collection
• Services
• Events
• Research
• Kids
• Teens

• Comments

Searching

As shown in the screenshots above, every instance of Enterprise has a basic search bar. The search fields available will vary based on the choices made by your Enterprise administrator, but the functionality remains the same. Drop-down options to the left of the search field and an Advanced Search to the right are available to help users limit their search for more specific results.
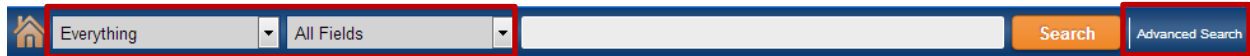
Search Suggestions (Auto-Complete)

As a user enters a search term in the Enterprise Search field, a list of likely terms is displayed. This is much like the auto-complete feature common to web browsers, except that the terms do not come from previous searches done on your computer. Instead, the list is made up of search terms that have successfully returned results at least three times in the last ten days.

If there are any search terms that the library does not want to be suggested, even though they may have successfully returned results three or more times in the past ten days, administrators can add these terms to a 'blacklist' of terms. Blacklisted items do not display. Enterprise comes with a default set of blacklisted terms that library administrators can add to or delete terms from as desired.

To use the Search Suggestion option:

1. Begin entering your search term.

2. When the list of search suggestions appears, select an appropriate search term from the list.
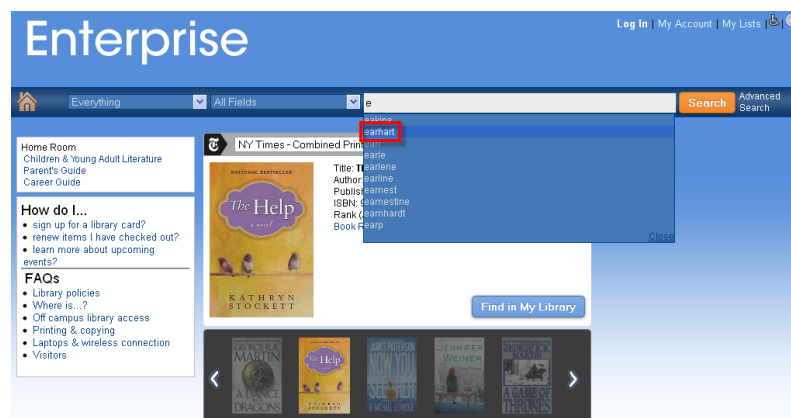
3. If the search results do not appear, click **Search**. The search executes the same as if you had entered the term completely

Additional Searching Features

Did You Mean

When a user enters search terms in Searching, their terms are compared against a server-specific dictionary created solely based on the content indexed into Enterprise. If you enable this feature, then for each search that the patron performs, Enterprise consults this dictionary and Searching displays the "Did You Mean?" phrase with alternative search terms suggested by the dictionary.
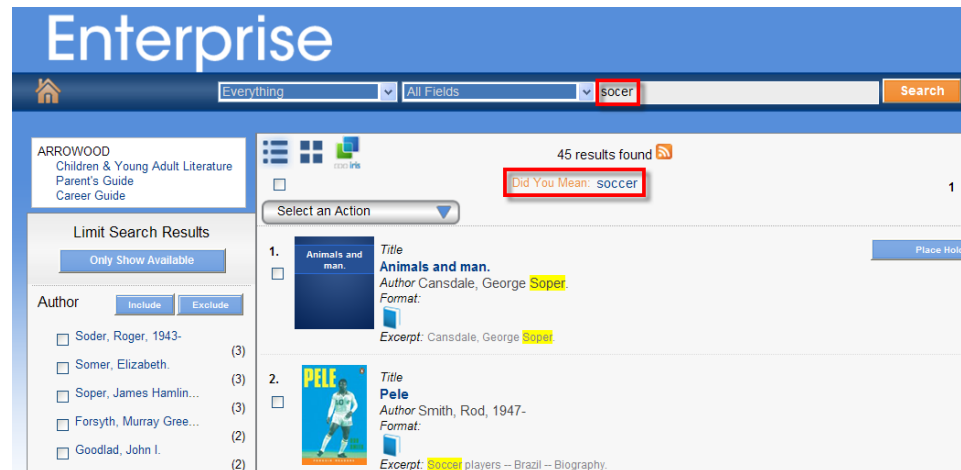
Boolean

All terms are considered when searching in Enterprise, including those typically limited to use as Boolean operators. This means that you can search for titles that may not always retrieve expected results in other systems because of a Boolean operator. A sample title would be 'Bud, not Buddy.'
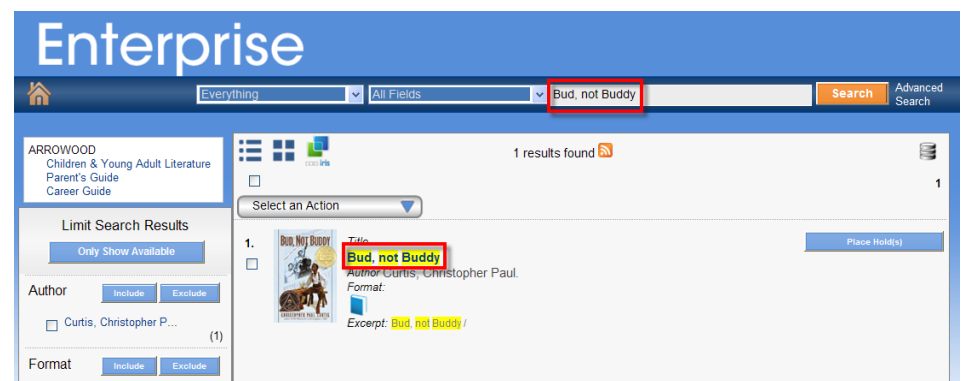
Diacritics

Enterprise treats search terms with diacritics differently than search term counterparts without diacritics. For example, the number of results associated with the search term "El Niño" may differ than the number of results associated with the search term counterpart "El Nino."

Furthermore, SOLR Lucene takes diacritics into account when determining how relevant a particular title is when compared to the search term. In other words, diacritics can affect where a title is placed on the hit list.

Enterprise ignores all other punctuation and capitalization.

Simple Search

Many searchers will ignore those options, and quickly enter a key search term. After the user types the search terms and clicks search, a hit list will appear. On the hit list, the user can take advantage of the Search Facets to the left of the hit list in order to narrow down their list of search results. The option to sort is also available at the top-right of the hit list. Notice that the user may choose to show only available items, and can include or exclude specific results.

Everything ▼ | All Fields ▼ | fifty shades | **Search** | Advanced Search

Search Results | Databases

Limit Search Results

[Only Show Available]

Author [Include] [Exclude]
☐ E L James (1)
☐ Jong, Erica (1)
☐ Lewis, Bernard. (1)

Format [Include] [Exclude]
☐ Books (2)
☐ eBook (1)

Electronic Format
[Include] [Exclude]
☐ ADOBE EPUB (1)
☐ HTML (1)
☐ KINDLE (1)

Material Type [Include] [Exclude]
☐ Book

Language [Include] [Exclude]
☐ English (3)

Library [Include] [Exclude]
☐ Few Library
☐ Moyers Library

Publication Date [Include] [Exclude]
☐ 1973 (1)
☐ 2003 (1)

Subject [Include] [Exclude]
☐ Erotic Literature (1)
☐ Fiction (1)
☐ Islam and politics. (1)
☐ Islamic fundamentali… (1)
☐ Jihad. (1)
More

3 Results Found 🔊   1

☐ | Select an Action ▼   Sort By: [   ] ▼

1. **Fifty Shades Darker**
by E L James
Format: ⬇

Electronic Format: ADOBE EPUB, HTML, KINDLE
Excerpt: Fifty Shades Darker E L James
Available: 1

[Text This To Me]
[Preview]
[Download]

2. **Fear of flying; a novel.**
Author: Jong, Erica
Jong, Erica
ISBN 9780030107313
Date : 1973
Material 📖

Call Number PS3560.O56 F42 1973
Number Available 1
Available:
No copies available at Arrowood University Library, 1 copies available at other libraries

[Place Hold]
[Text This To Me]
[Cite This]

👍 0
[f Like]

3. **The crisis of Islam : holy war and unholy terror**
Author: Lewis, Bernard.
Lewis, Bernard.
ISBN 9780679642817
Date : 2003
Material 📖

Call Number BP182 .L48 2003
Number Available 1
Available:
No copies available at Arrowood University Library, 1 copies available at other libraries

[Place Hold]
[Text This To Me]
[Cite This]

👍 0
[f Like]

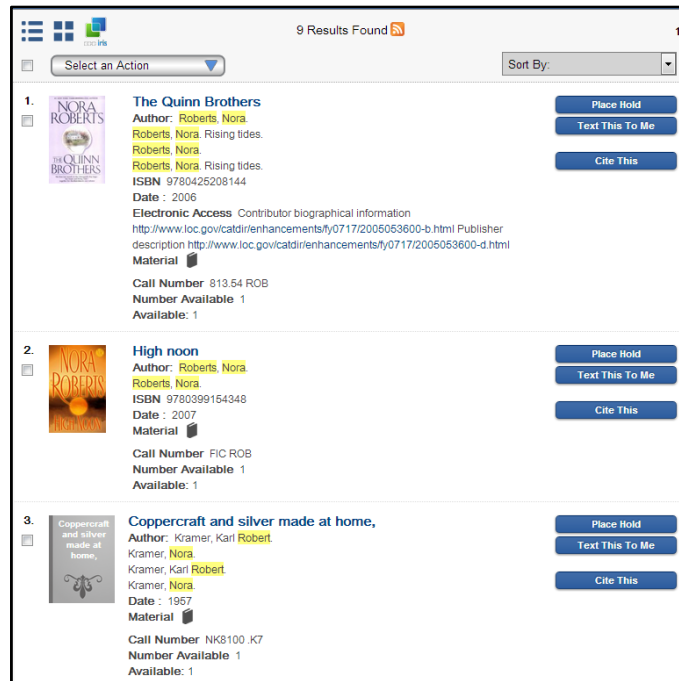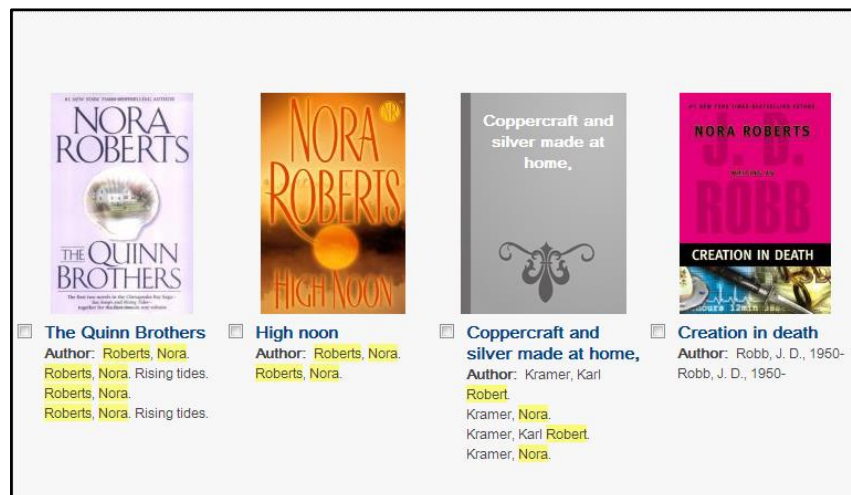☐ | Select an Action ▼   1

Hit List Views

When multiple records are returned (or when searching in multiple search sources), the search results will display in a hit list. There are three possible views for the hit list: list, thumbnail, and CoolIris
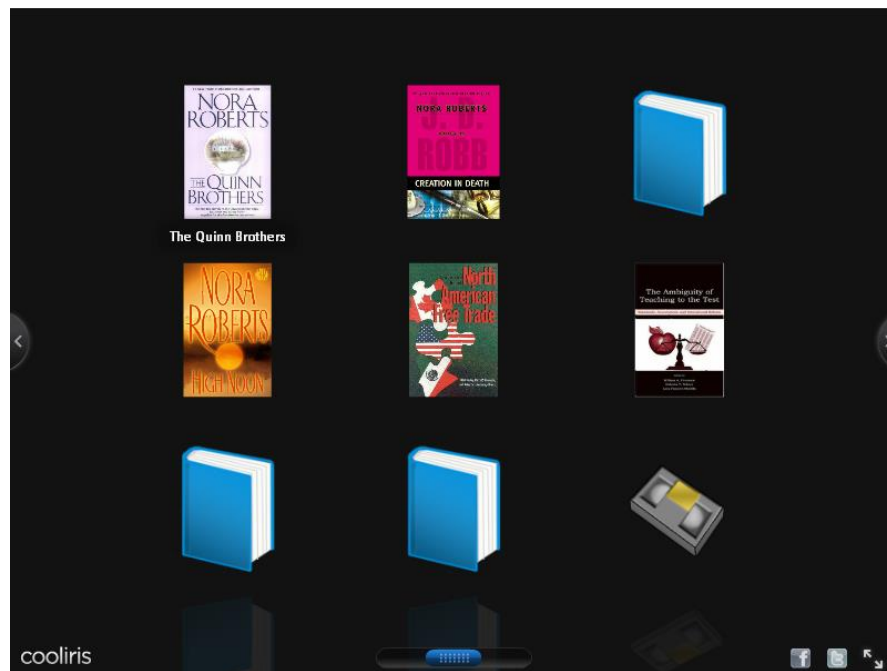
The List view is the default.

The middle icon represents the Thumbnail view.

The final icon represents the CoolIris view.

There are several easy-to-use navigation options within the CoolIris view. Note that your Enterprise administrator may have configured your CoolIris view to appear differently. Also, it is possible to use the CoolIris view to post about a specific title in Facebook or on Twitter.

Hit List Features

Many features are available for your library to incorporate into your hit list. Following is a list of the most common buttons that appear when you are using the List view. However, you will only see on your system those buttons which have been enabled by your Enterprise administrator. You may also see additional options that have not been listed if your administrator has created custom buttons.

Text This To Me

After finding a title, the user wants to remember the title information or have their friend pick the book up for them. An easy way to do this is to click "Text This To Me". This enables the user to text the title details to any text enabled phone. The usual texting rates apply. The message will include Call Number, Title, Author and a link to the title in your Enterprise site.

Place Hold

Users may place title or item level holds.

To Place a Hold

1. Click "Place Hold".

2. Enter your user account number and password/PIN when prompted to do so. (If you are already logged in to "My Account," you will not be prompted to do so again.)

3. Choose the library from which to pick up the item when it becomes available.

4. Choose the copy number you desire, if you want a specific copy.

5. Click OK.

   Note: You can manage your holds queue (list) from "My Account"
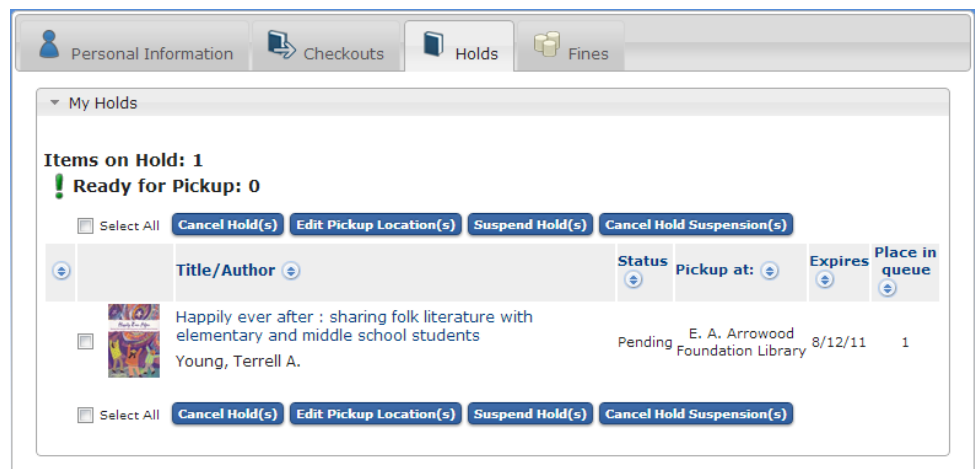
Download

Online resources can be downloaded from the designated vendor if you have integrated the eResource Central product. The appearance of the download will vary by the type of download you select. Below are a few examples:
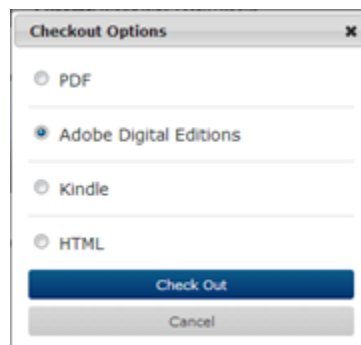
Adobe Digital Editions
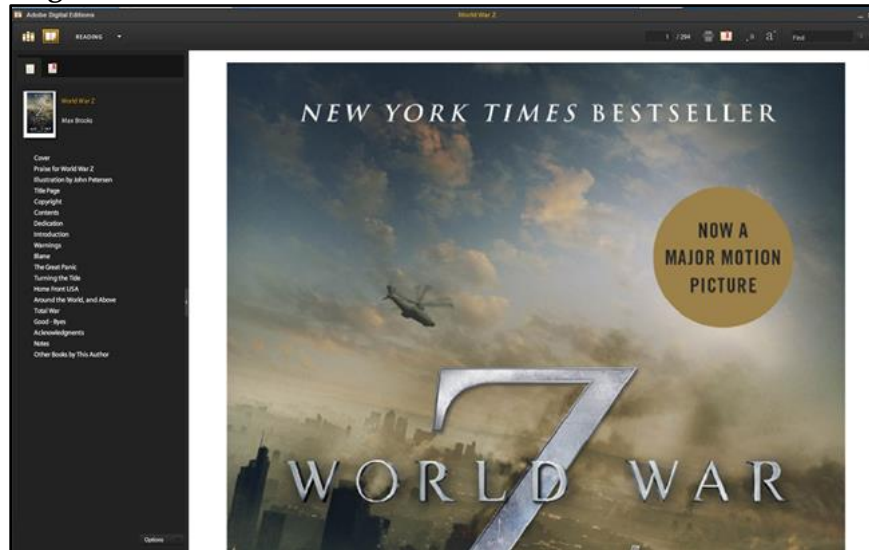
Kindle

When checking out an online resource for a Kindle, from your computer, you will be taken to the screen below, so that you can later pull it into your Kindle.

HTML

Use the circle to the right of the title to view a Table of Contents.

Preview

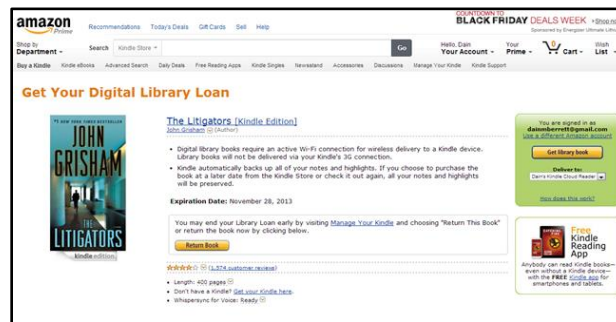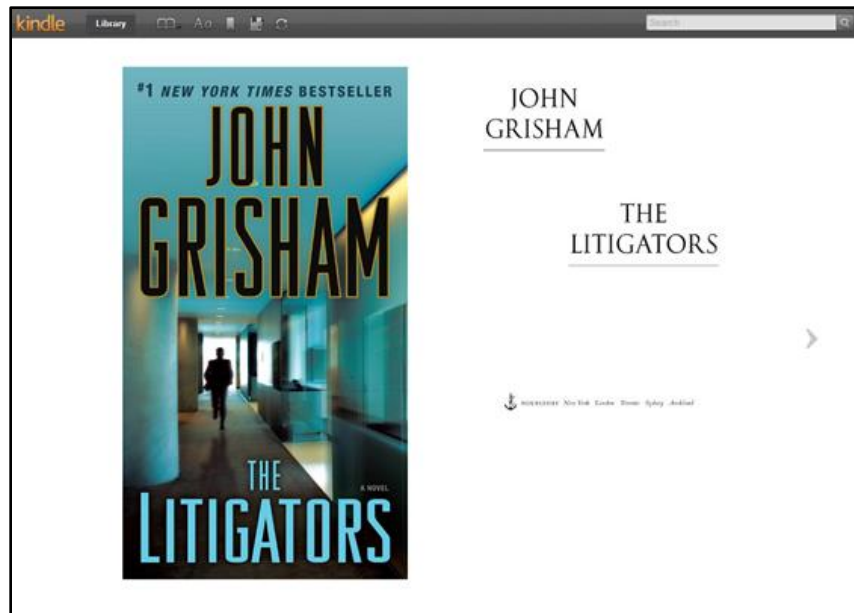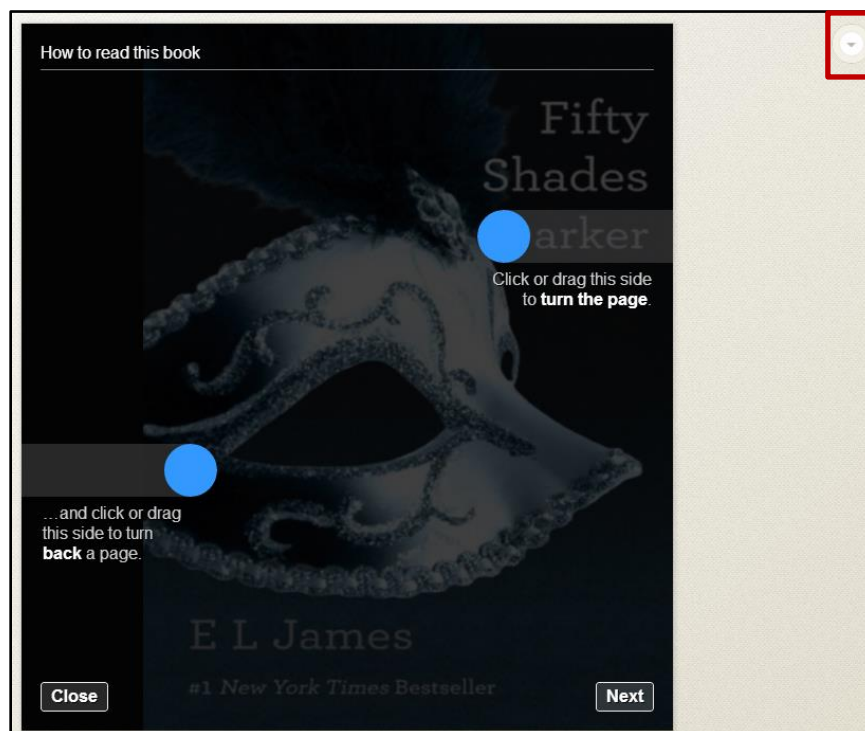For online resources, as available from the vendor, users can preview the title before committing to checking it out. Use the circle in the top right corner to navigate the table of contents, to see available content. The preview looks the same as the example above for an HTML download.

Buy It Now

If your library has activated the free "Buy It Now" feature, users can purchase anything from Amazon using this tool. The library receives a percentage of each purchase. Clicking "Buy It Now" opens the Amazon website with your search pre-entered, showing all matching items available from Amazon.

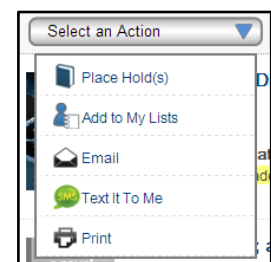Your Enterprise administrator can contact SirsiDynix to activate this feature.

Like

Users can choose to "Like" titles on their Facebook page. When a "Friend" clicks on that title within Facebook, their browser will be directed to that title in your Enterprise system.

Cite This

This optional tool assists users in citing the title, in either RefWorks or in Zotero, as configured by your Enterprise Administrator.

Select an Action

This menu (above the list) enables users to Place Holds, Add titles to Lists, Email the title to anyone, text the title details to any text enabled phone, or print the title.

Detailed Display

Users can see more information about each title by clicking on the title or book jacket icon. Your Enterprise administrator defines which fields appear on the Detailed Display. Many of the actions available on the hit list are also available in the Detailed Display, including Place Hold and Buy It Now.

Additional collapsible sections appear at the bottom of the screen with more information about this title. In addition to several of the standard sections described below, your Enterprise administrator may have created custom sections, which may also appear on this page.

Available

This section displays existing copies, as well as other information defined by your administrator, such as Material Type, Call Number, Location/Status, or Library.

Material Type	Shelf Number	Audience Level	Genre	Status
New books	F ROM JAMES	Adult Reading Level	Romance	On hold for someone
New books	F ROM JAMES	Adult Reading Level	Romance	Due 12/8/13
New books	F ROM JAMES	Adult Reading Level	Romance	Due 11/14/13
New books	F ROM JAMES	Adult Reading Level	Romance	Due 11/24/13

Summary

If this title has a summary (as a part of your enriched content subscription), the Summary section displays any available summary for the selected title.

Summary

Daunted by the singular tastes and dark secrets of the beautiful, tormented young entrepreneur Christian Grey, Anastasia Steele has broken off their relationship to start a new career with a Seattle publishing house. But desire for Christian still dominates her every waking thought, and when he proposes a new arrangement, Anastasia cannot resist. They rekindle their searing sensual affair, and Anastasia learns more about the harrowing past of her damaged, driven and demanding Fifty Shades. While Christian wrestles with his inner demons, Anastasia must confront the anger and envy of the women who came before her, and make the most important decision of her life. This book is intended for mature audiences.

Reviews

If this title has any reviews, this section displays the reviews for this title. These may be either professional reviews (as a part of your enriched content subscription) and/or reviews from other readers (if your library has a Chilifresh subscription integrated into your Enterprise system).

Excerpts

If this title has any excerpts (as a part of your enriched content subscription), the Excerpts will show any available excerpts or pages from the title.

Google Preview

If this section is enabled by your administrator & if this title is available on Google Books, this displays a preview of the title provided by Google Books.
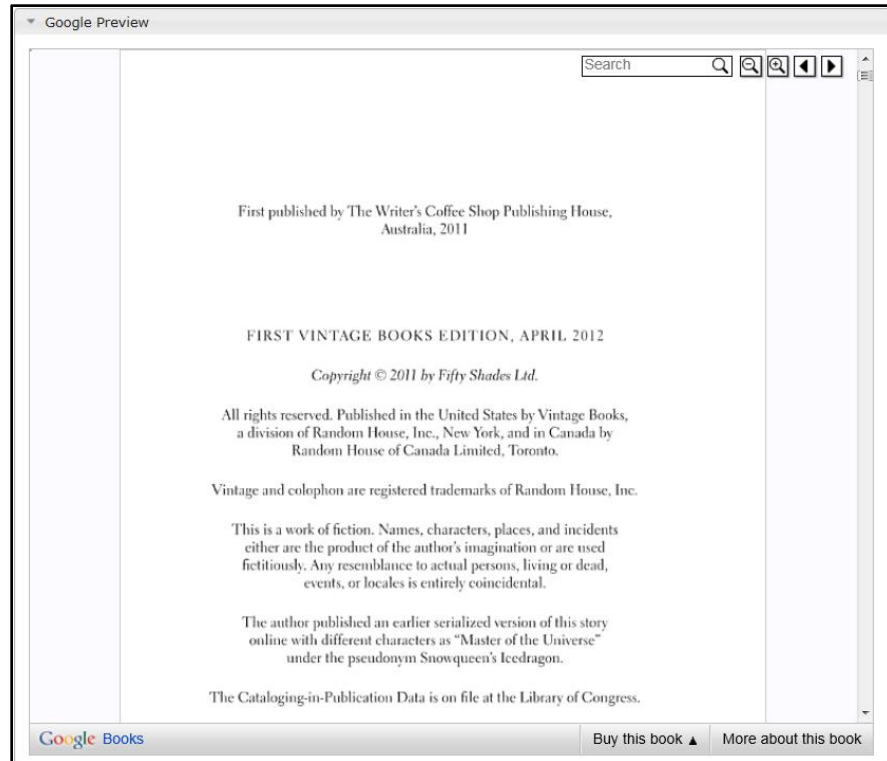
Advanced Searching

Users may also use the Advanced Search option to the right of the Search field to create specific searches.


Note that the Search Targets and Limits at the bottom will differ on your Enterprise system, to correspond with the search drop-down menu from your system.

Faceted Searching (Filtering)

Facets (filters) in Enterprise allow users to limit and refine their searches. Within a search results list, facets appear at the left side of the screen. The facet display can be controlled by the Enterprise administrator.

To filter search results

1. Check the box next to the filter you wish to include or exclude.

2. Click the "Include" or "Exclude" button, as appropriate.

3. Repeat steps 1 & 2 with as many filters as necessary.

4. The selections made in the Search Results list will appear at the top, with a Red X to the right of each filter selection. You may remove any filters by clicking the red X.
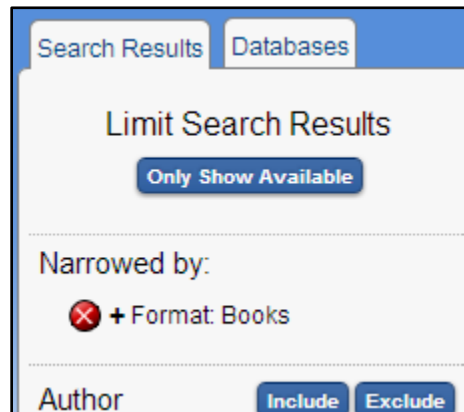
Database Searching

If enabled, you may see tabs next to the "Search Results" tab (left). These tabs provide the results for the search the user entered, but in other databases, such as nearby libraries or universities. If your Enterprise administrator has enabled federated searching with EBSCO Discovery Services (EDS) or with any other subscription databases, these databases will appear in the same area.
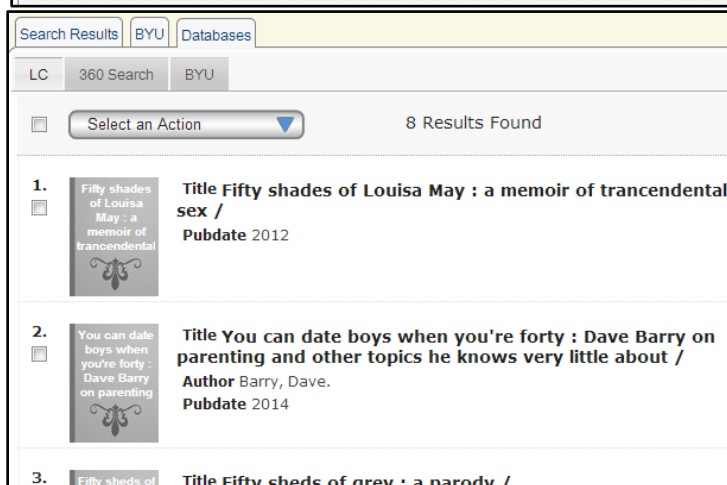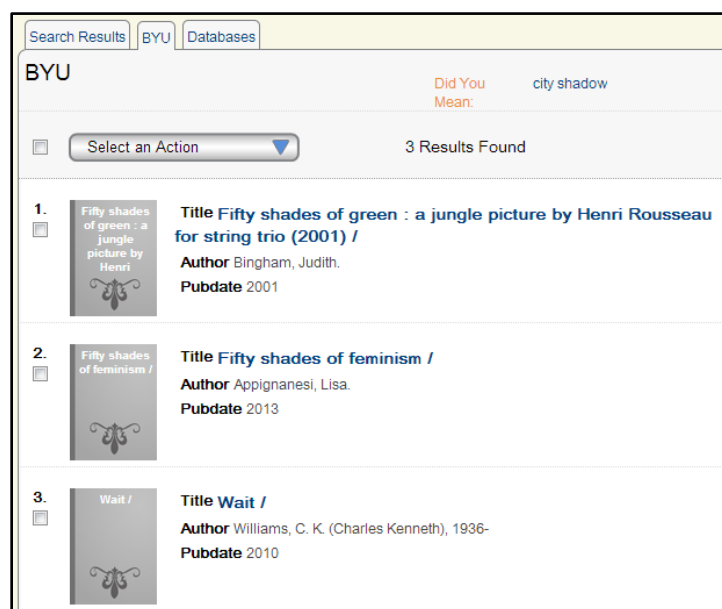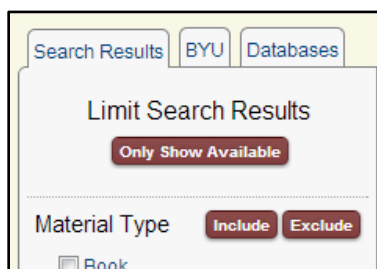
My Lists

Users can create lists of titles to reference as needed, such as titles you have already read, those you wish to read, or those you may want to remember for a family member.

To create a list

1. Check the box to the left of the title(s), from the hit list.
2. Click "Select An Action".
3. Select "Add to My Lists".

To Manage/Edit "My Lists"

You must be logged in to Enterprise to manage "My Lists".

- Click "My Lists" at the top of the page.
- Click the "+" to add a list.
- To move items from one list to another, click on the title; then, drag it to the desired list.
- To move multiple titles at once, check the box to the left of each title, then use the "Select an Action" drop-down to "move" or "copy" the titles.
- To remove a list, check the box to the right of the list, then click "-".
- The actions available from within the hit list are also available in "My Lists".
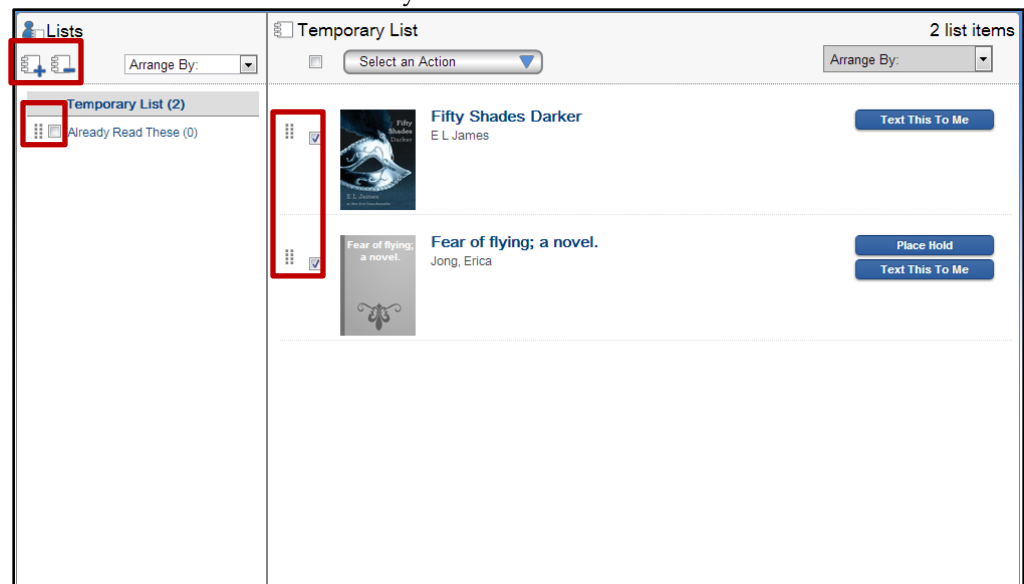
My Account

"My Account" includes tabs containing Checkouts, Holds, Bills and Personal Information. Your administrator can control much of what displays here.


Personal Information

This tab includes Address information, PIN settings, Preferences, and details about other members of this user's group (if your library has Group Card functionality enabled).

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Checkouts

This tab displays current check out information for the user, including due dates and overdue information. Users may also choose to renew any checked out materials here.
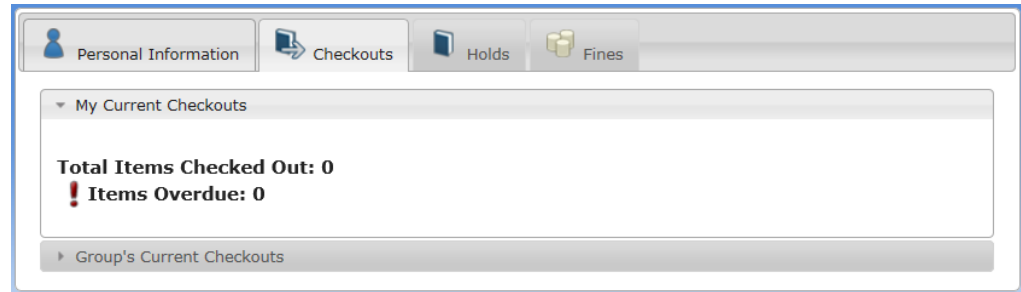
If the user group / family card functionality is enabled in SirsiDynix Symphony, the Checkouts tab will also display checkouts for other visible members of his/her group.

If checkout history is enabled in SirsiDynix Symphony and also activated by the Enterprise administrator, the Checkouts tab will also display any checkout history that may be stored for this user.

Holds

This tab displays the user's current holds, including his/her place in the hold queue, expiration date, and pickup location. Users can choose to "Cancel Hold(s)", "Edit Pickup Location(s)", "Suspend Hold(s), or "Cancel Hold Suspension(s)" for one or more items in the list.

**Suspending a hold tells the system that the user will not be available to pick-up the item(s) during a certain date range. The item will continue to move through the queue, but the user will stay next in line for the item, rather than losing his/her place.

If the appearance of your system does not match this example, please note that many of these options can be disabled by your Enterprise administrator if they are not relevant in your setting.

Fines

This tab displays all accruing fines and outstanding bills for the user and any associated group members (if enabled). If online payments are accepted, the user will be able to make the payment here.

Summary Box

A quick view of the My Account Details displays to the right of "My Account". This section includes the user's status (such as Delinquent or Blocked), Total Checkouts, Total Holds, and Total Fines (final bills, not accruing amounts).

Accessibility

Enterprise is delivered with an option to use an ADA mode. Using the ADA mode specifies that the Searching interface for the profile opens in the mode that complies with the Americans with Disabilities Act. The ADA mode makes the Searching interface easier to navigate without a mouse. For example, item detail displays open on a new page instead of in a modal window, and the Select an Action menu in the search results and item detail display opens in a default drop-down list. In addition, shortcut links are included at the top and bottom of each page to allow quick access to content, search, and other page elements depending on which page is open.

The ADA mode can be turned on by default, or changed from an icon to a text link ("ADA mode"), or completely removed by your Enterprise administrator.